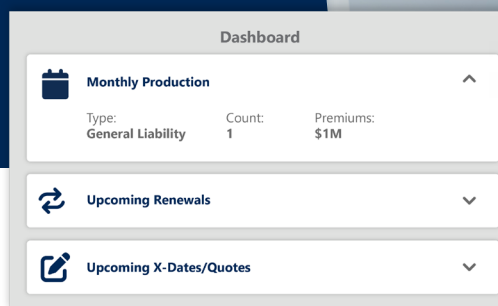




Agency Matrix

The agency management system your agency needs to maximize efficiency, productivity, and sales



As an insurance agency, you need one of the best agency management systems, with cutting-edge technology, an easy-to-use interface, and dedicated support. Agency Matrix is committed to delivering insurance software solutions that meet these criteria and will help you reach your business goals. Agency management doesn't have to be hard.

Agency Matrix maximizes efficiency. In one year, users reduced the time to remarket a policy by 24%, saved time quoting and binding a new policy by 39%, and increased the number of policies sold per client by 16%!

Increase Revenue with Renewals and Retention

Warning, revenue growth ahead. Free up your Customer Service team from meaningless data reentry tasks to follow up on more leads and dedicate more time to servicing customers. With easy-to-use dashboards, x-date tracking, accounting reports, sweep tracking and more, your team can stay organized ahead of the busy season rush.

Save Time for Building a Better Client Experience

Give your team structured workflows like a daily dashboard, end-of-day tracking tools and more to help them have more time to focus on sales, retention and ultimately their customers.

Improve Workflow Efficiency and Staff Productivity

Consolidate workflows and processes like email and text communications for renewals as well as policy changes, manage tasks, control workflows, identify cross-sell opportunities and manage your prospects and quotes all in one industry specific product.

Want to learn more?
Contact us at 855-454-6100
marketing@zywave.com



Agency Matrix Product Comparison Chart

	Business	Performance
Account & Contact Management		
Customer Organized System	✓	✓
Import/Export Customers & Prospects	✓	✓
ACORD Forms	✓	✓
Imaging (Direct Scan)	✓	✓
Custom User Access Controls		✓
Email Capabilities & Outlook Integration	✓	✓
Letters	✓	✓
Texting	✓	✓
Activity & Workflow Management		
Task Management & Alerts	✓	✓
Production Dashboard	✓	✓
Custom Workflows & Customer Types		✓
Submissions Generator		✓
Employee Time Clock	✓	✓
File Management		
Unlimited Document Management (Upload, Manage, Organize, Create, Track)	✓	✓
Opportunity Management		
X-Date Tracking	✓	✓
End-of-Day Tab	✓	✓
Policy Management		
Custom Policy Types & Fields		✓
Accounting & Commission Tracking		
Receive, Record & Reconcile Payments & Checks	✓	✓
Commissions Tracking	✓	✓
Sweep Tracking & Reconciliation	✓	✓
General Ledger		✓
Taxes		✓
Reporting	✓	✓
Agency Insights Reporting		
Automated & Customized Reporting	✓	✓

Integrations

- TurboRater
- Comparative Rating
- Fully Cloud-Based Solution
- Fully Cloud-Based Carrier Downloads
- Ebix TEAM-UP Integration